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## Introductions

- **Presenter**
  - *Mike Nelson*
- **Presenter**
  - *Tony Bridges*
- **Moderator**
  - *Jeff Harrison*



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## Agenda

- Microsoft Dynamics 365
- Absentee Applications
- In-person Absentee Voting
- Election Specific Absentee Applications
- Issuing Absentee Ballots
- Issuing Ballots Using Batches
- Absentee Ballot Reports
- Managing Absentee ballots
- Calendar Year Letter
- Usability Testing



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# Presentation Format

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## Overview

### Changes Made/In Progress

*Changes deployed to production*

*Changes likely to pass testing*

### Bucket List

*Our list of potential improvements before 2020*

*Your list of potential improvements*

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# Microsoft Dynamics 365

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Enhanced security with all updates/features

Changes will be cosmetic

Functionality of WisVote absentee will remain the same

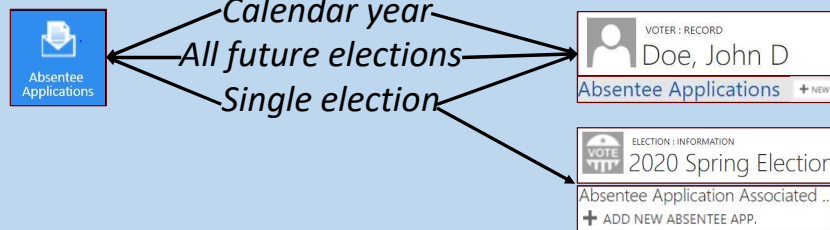
Testing is ongoing

No deployment date has been set

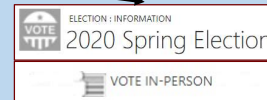
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# Absentee Applications

Two absentee period specific application entry points



Only one entry point for a Vote-in-Person absentee ballot delivery method



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# Absentee Applications

Change

Effective After Election

ABSENTEE APPLICATION	
New Absentee Application	
<b>Election Info</b>	
Absentee Period *	All Future Elections
All Future Elections *	Yes
Effective After Election	2019 Spring Election

Allows for a new calendar year/all future elections application when a vote-in-person application exists

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# Absentee Applications

My Active Absentee Applications ▾

Absentee Period	Name of Election
Current Election	2019 Spring Election
All Future Electi...	
Calendar Year	
Current Election	2019 Spring Election

*Name of election added to the absentee applications associated view, my inactive applications, quick find, and absentee application lookup view.*

Voters								
	Name	Voter Reg Num	DOB	Address	Photo ID	SSN	Municipality	Status/Reason
<input checked="" type="checkbox"/>	Doe, John D	700825487	01/01/1990	N12131 OLD STAGE RD, HUMBIRD	Yes		TOWN OF CLEVELAND - JACKSON	Active/Registered

Possible addition of photo ID in the show/hide.

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# Absentee Applications



CREATE BALLOT AND PRINT

Button is available anytime an absentee application is entered for a single election and the contests and candidates on the election progress line have been checked.

Outside the election:

Save the application first, then Create Ballot and Print button becomes available

Under an election:

Create Ballot and Print is available and saves the application as well as printing the ballot if needed.

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# In-Person Absentee Voting

**ELECTION INFORMATION**  
2020 Spring Election

**VOTE IN-PERSON**

**ABSENTEE APPLICATION**  
New Absentee Application

**Voter & Application Info**

**Voter Info**

Voter Name \*

Search By Reg Num

Voter Type \* **Regular**

Home Address \*

Search feature unable to locate certain voter records only by voter registration number. It is very rare but raises concerns that there is some problem with the voter's registration when there is none. If you have experienced this problem, please forward the names of those voters.

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# In-Person Absentee Voting

**ELECTION INFORMATION**  
2020 Spring Election

**VOTE IN-PERSON**

**ABSENTEE APPLICATION**  
New Absentee Application

**Voter & Application Info**

**Voter Info**

Voter Name \*

Search By Reg Num

Voter Reg Num

DOB

Voter Status \* **Active**

Confidentiality Option

Voter Type \* **Regular**

County Address \*

Phone Contact \*

**Ballot Delivery Info**

Ballot Delivery Method \* **Voted in Person**

**Application Info**

Application Type \* **Regular**

Application Date \* **4/22/2019**

Application Status \* **Voted in Person**

ITCA

Birth Name

Jurisdiction \* **TOWN OF CLEVELAND - JACKSON COUNTY**

Outside Voter

**Election Info**

Absentee Period \* **2020 Spring Election and Presidential Preference Vote**

Name of Election \* **2020 Spring Election and Presidential Preference Vote**

In-Person absentee applications will continue to be entered under each election with the ballot delivery method, application information and election information defaulted.

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# In-Person Absentee Voting

**2020 Spring Election**

**VOTE IN-PERSON**

Voter search detects that an active all future elections or calendar year application exists for this voter. WisVote allows for those applications to remain in force for future elections based upon voter request.

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# In-Person Absentee Voting

**2020 Spring Election**

**VOTE IN-PERSON**

Spoiling Ballots: Voter search detects that an application and ballot for this election is active for this voter. Clicking "Yes" inactivates the current application and ballot and creates a Vote-in-Person application and ballot when clicking "Create Ballot and Print".

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## Election Specific Applications

**ELECTION INFORMATION**  
2020 Spring Election and Presidential Preference ...

Absentee Application Associated ... ▾

+ ADD NEW ABSENTEE APP... ISSUE BALLOTS ISSUE BATCH BALLOTS

✓ Name ↑	Absentee Peri...	Application Source	Absentee...	Application Ty...
Prince, Penny	Current Election	Mail	Active	Regular
Johnson, James J	Current Election	Mail	Active	Regular
Watson, Willis	Current Election	Mail	Active	Regular
Doe, John D	Current Election	Mail	Active	Regular

Absentee applications entered under a specific election will continue to appear in that election's absentee applications associated view immediately with/without the contests and candidates progress line being checked complete.

All future elections/calendar year applications entered from the absentee application tile or via voter record will appear:

- 30 days out for elections with a statewide contest
- 60 days out for elections with a federal contest
- Immediately if entered after contests/candidates are complete
- Overnight for a special election after contests/candidates are complete

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## Issuing Absentee Ballots

**ELECTION INFORMATION**  
2020 Spring Election and Presidential Preference ...

Absentee Application Associated ... ▾

ISSUE BALLOTS ISSUE BATCH BALLOTS

WisVote allows issuing of ballots on condition that the contests/candidates are complete independent of state and county checkpoints

**Issue Absentee Ballots:**

- When single election applications are entered
- Issue single or multiple ballots from the Absentee Applications View
- As Batches
- Generate label report simultaneously with ballot creation

Election Progress

Contests Complete Candidates Complete

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## Issuing Absentee Ballots

Absentee Ballots Associated View

☒ MARK BALLOTS AS RETUR... 
 ☐ RECORD RETURNED BALL... 
 ☐ LETTERS 
 ☐ MARK BALLOTS AS NOT R... 
 
 
 ...

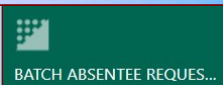
<input checked="" type="checkbox"/>	Name ↑	Ballot Status	Batch Name (A...	Care Facility Na...	Mailing Id	Date Ballot Sent	Date Ballot Return...	Ballot Status R	
	Aaroen, Debra Lorraine	Active			1,033,214	3/8/2019	3/28/2019	Returned	In
	Abarr, Russell Lewis	Active				3/30/2019	3/30/2019	Returned	Rv
	Abbott, Deirdre K	Active				3/29/2019	3/29/2019	Returned	Rv
	Adamski, Mary J	Active				3/28/2019	3/28/2019	Returned	Rv
	Adkins, Beverly J	Active	PRAIRIE GARDE...		1,033,375	3/11/2019		Not Returned	In
	Albrecht, Anna B	Active				3/27/2019	3/27/2019	Returned	Rv
	Albrecht, Ronald J	Active				3/27/2019	3/27/2019	Returned	Rv
	Albright, Barbara J	Active			1,104,123	3/15/2019	3/25/2019	Returned	In
	Albright, Carol Sue	Active				3/25/2019	3/25/2019	Returned	Rv
	Albright, G. Patricia	Active			1,033,056	3/8/2019	3/28/2019	Returned	In
	Albright, George J	Active			1,104,120	3/15/2019	3/25/2019	Returned	In
	Alden, Sharyn L	Active				3/26/2019	3/26/2019	Returned	Rv
	Allard, Keri L	Active				3/29/2019	3/29/2019	Returned	Rv
	Allard, Simon T	Active				3/29/2019	3/29/2019	Returned	Rv
	Allman, Elizabeth Ann	Active				3/27/2019	3/27/2019	Returned	Rv

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## Issuing Ballots Using Batches


Batch absentee request form facilitates issuing ballots based upon filtering criteria entered by user.

The complete process from selecting the filters to printing of mailing labels may be completed from within the Batch Absentee Request views.



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## Issuing Ballots Using Batches


BATCH BALLOT REQUEST : BATCH ABSENTEE REQUEST

### New Batch Ballot Request

Completed ☐ No

- Batches will include all applications that exactly match all criteria.
- New ballots will not be issued if an active ballot already exists.


Description *	New Batch	Care Facility	--
Election *	Rep Assembly District 64 Special Election	Batch Name On Absentee	--
ApplicationType *	--	No Label	<input type="checkbox"/>
Ballot Delivery Method *	--	Jurisdiction	CITY OF KENOSHA - KENOSHA COUNTY

**Counts**

Absentee Application	<input type="checkbox"/> --
Ballot Count	<input type="checkbox"/> --

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## Issuing Ballots Using Batches


BATCH BALLOT REQUEST : BATCH ABSENTEE REQUEST

### New Batch Ballot Request

Completed ☐ No

- Batches will include all applications that exactly match all criteria.
- New ballots will not be issued if an active ballot already exists.

Description *	New Batch	Care Facility	--
Election *	Rep Assembly District 64 Special Election	Batch Name On Absentee	--
ApplicationType *	--	No Label	<input type="checkbox"/>
Ballot Delivery Method *	--	Jurisdiction	CITY OF KENOSHA - KENOSHA COUNTY

**Counts**

Absentee Application	<input type="checkbox"/> --
Ballot Count	<input type="checkbox"/> --

Care Facility, Batch Name on Absentee, and Ballot Delivery Method data field entries may be edited/added on absentee applications

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# Issuing Ballots Using Batches

## Save and Close New Batch Request

SAVE SAVE & CLOSE NEW CANCEL

BATCH BALLOT REQUEST - BATCH ABSENTEE REQUEST

New Batch Ballot Request

Completed No

## Workflow runs automatically to create ballots

Absentee applications and number of ballots created from those applications

BATCH BALLOT REQUEST - BATCH ABSENTEE REQUEST

May Referendum

Completed Yes

Batches will include all applications that exactly match all criteria. New ballots will not be issued if an active ballot already exists.

Description \* May Referendum

Election \* Town of Vernon Special Election

Application Type \* --

Ballot Delivery Method \* Mail

Care Facility --

Batch Name On Absentee \* --

No Label --

Jurisdiction TOWN OF VERNON - WAUKESHA COUNTY

Counts

Absentee Application Count 22

Ballot Count 22

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# Issuing Ballots Using Batches

## Date Ballot Sent Date populating correctly

Absentee Ballots Associated View

Search for records

MARK BALLOTS AS RETURNED RECORD RETURNED BALLOT LETTERS MARK BALLOTS AS NOT RETURNED ADD EXISTING ABSENTEE

Name	Ballot	Mailing Id	Date Ballot Sent	Date Ballot Return...	Ballot Status Reaso...	Application Ty...	Chart Pane
Courtois, Carl K SR	Active	1,122,598	4/26/2019		Not Returned	Indefinitely Cor	Run on Selected Records
Courtois, Roberta J	Active	1,122,599	4/26/2019		Not Returned	Indefinitely Cor	Absentee Ballot Certificate
Gauger, Angie A	Active	1,122,609	4/26/2019		Not Returned	Regular	Absentee Labels dymo
Gauger, Greg L	Active	1,122,610	4/26/2019		Not Returned	Regular	Absentee Labels sheet
Gauger, Jack L	Active	1,122,607	4/26/2019		Not Returned	Regular	
Gauger, Marilyn A	Active	1,122,608	4/26/2019		Not Returned	Regular	
Hattinger, Joshua C	Active	1,122,614	4/26/2019		Not Returned	Regular	
Hattinger, Melissa J	Active	1,122,615	4/26/2019		Not Returned	Regular	
Johnson, Craig A	Active	1,122,619	4/26/2019		Not Returned	Regular	
Kalfas, Katharine Jane	Active	1,122,618	4/26/2019		Not Returned	Regular	
Meyer, Jeffrey Aaron	Active	1,122,606	4/26/2019		Not Returned	Regular	
Meyer, Julie A	Active	1,122,605	4/26/2019		Not Returned	Regular	
Meyer, Thomas Garrett	Active	1,122,604	4/26/2019		Not Returned	Regular	

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## Issuing Ballots Using Batches

**Date Ballot Sent Date** populating correctly

Absentee Ballots Associated View

☒ MARK BALLOTS AS RETUR... 
 ☐ RECORD RETURNED BALL... 
 ☐ LETTERS 
 ☐ MARK BALLOTS AS NOT R... 
 ☐ ADD EXISTING ABSENTEE ... 
 \*\*\*

✓	Name ↑	Ball...	Mailing Id	Date Ballot Sent	Date Ballot Return...	Ballot Status Reaso...	Application Ty	Chart Pane
	Courtois, Carl K SR	Active	1,122,598	4/26/2019		Not Returned	Indefinitely Con	Run on Selected Records
	Courtois, Roberta J	Active	1,122,599	4/26/2019		Not Returned	Indefinitely Con	Absentee Ballot Certificate
	Gauger, Angie A	Active	1,122,609	4/26/2019		Not Returned	Regular	Absentee Labels dymo
	Gauger, Greg L	Active						Absentee Labels sheet
	Gauger, Jack L	Active						Mail Official
	Gauger, Marilyn A	Active						Mail Official
	Hattinger, Joshua C	Active	1,122,614	4/26/2019		Not Returned	Regular	Mail Official
	Hattinger, Melissa J	Active						Mail Official
	Johnson, Craig A	Active						Mail Official
	Kalfas, Katharine Jane	Active						Mail Official
	Meyer, Jeffrey Aaron	Active						Mail Official
	Meyer, Julie A	Active	1,122,605	4/26/2019		Not Returned	Regular	Mail Official
	Meyer, Thomas Garrett	Active	1,122,604	4/26/2019		Not Returned	Regular	Mail Official

Allow custom sorting of the Absentee Label Reports for printing

Print a single label for absentee ballots for indefinitely confined voters at SVD serviced Care Facilities

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## Absentee Ballot Reports

### Absentee Ballot Listing

Contains all absentee ballots issued  
Sorted alphabetically

### Absentee Poll Listing

Contains all active absentee ballots  
Sorted alphabetically

### Absentee Central Count

Contains all active absentee ballots  
Sorted by ward, then alphabetically with ward and grand totals  
Includes barcode for scanning participations

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## Absentee Ballot Reports

Absentee Ballot Listing

Absentee Poll Listing

Absentee Central Count

Allow custom sorting/grouping of report results

Voter Reg Num	Voter Name	Address	Ward	App Type	Ballot Issued	Ballot Returned	Ballot Type	Ballot Style	Polling Place	BIT #	Notes

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## Managing Absentee Ballots

Absentee Associated View contains the complete records of absentee ballots for management to include batch ballots. Single or multiple records may be marked for action.

Absentee Ballots Associated View

☒ MARK BALLOTS AS RETUR... 
 ☐ SET BALLOTS SENT DATE 
 **Record Returned Ballots**
☐ MARK BALLOTS AS NOT R... 
 ☒ ACTIVATE 
 \*\*\*

Name	Ballot Status	Batch Name (A...	Case Facility No...	Mailing Id	Date Ballot Sent	Date Ballot Return...	Ballot Status Reason...	Application Ty...	Ballot Deliv...
Armstrong, Glen A	Active			1,122,984	4/17/2019		Not Returned	Indefinitely Con...	Mail
Bailey, Barbara	Active			1,122,978	4/17/2019		Not Returned	Indefinitely Con...	Mail
Barcz, Lynn D	Active			1,122,819	4/17/2019		Not Returned	Regular	Mail
Barcz, Richard	Active			1,122,821	4/17/2019		Not Returned	Regular	Mail
Breitenstein, Patricia E	Active			1,122,838	4/17/2019		Not Returned	Indefinitely Con...	Mail
Brown, Anna Lee	Active			1,122,950	4/17/2019		Not Returned	Indefinitely Con...	Mail
Bruss, Mercedes	Active			1,122,960	4/17/2019		Not Returned	Indefinitely Con...	Mail
Buckler, Vicki Ann	Active			1,122,942	4/17/2019		Not Returned	Indefinitely Con...	Mail

Entering a returned date that is after the election automatically inactivates the ballot with the reason "Returned After Deadline"

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## Managing Absentee Ballots

Recording of returned ballots by auto scanning or searching by name

Record   UnRecord   Clear   ☒ Auto-Fill

Ballot recorded successfully.

### Record Returned Ballots

**Absentee Ballots As**  
☒ MARK BALLOTS AS RETUR...   ☐ SET

✓ Name ↑   Ballot S

Armstrong, Glen A	Active
Bailey, Barbara	Active
Barcz, Lynn D	Active
Barcz, Richard	Active
Breitenstein, Patricia E	Active
Brown, Anna Lee	Active
Bruss, Mercedes	Active
Buckler, Vicki Ann	Active

Mailing ID : \*  
 Or By Name :  
 Response Date : \* 04/29/2019  
 Response Type : \* Returned

Election Name : Town of Vernon Special Election  
 Voter Status : Active  
 Voter Name : Doe, John D  
 Absentee Address : S101W24630 FOREST HOME AVE, BIG BEND, WI 53103-0574

Mailing ID	Response Date	Response Type	Election Name	Voter Status	Voter Name	Absentee Address	Status - StatusReason
1123309	04/29/2019	Returned	Town of Vernon Special Election	Active	Doe, John D	S101W24630 FOREST HOME AVE, BIG BEND, WI 53103-0574	Active - Returned

Application Ty...   Ballot Deli...  
 Indefinitely Con...   Mail   0  
 Indefinitely Con...   Mail   0  
 Regular   Mail   0  
 Regular   Mail   0  
 Indefinitely Con...   Mail   0  
 Indefinitely Con...   Mail   0  
 Indefinitely Con...   Mail   0  
 Indefinitely Con...   Mail   0

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## Managing Absentee Ballots

Removed as reasons for deactivating absentee ballots:  
 Returned Late, Absentee Ballot Postmarked after Election Day, POR not received, Postmarked After Election Day

Adding: Poll Worker Error

Deactivate  
 Delete Absentee Ballot  
 Detect Duplicates  
 Chart Pane  
 Run Workflow  
 Start Dialog  
 Run Report  
 Export Absentee Ballots

**Ballot Status Reason**  
 Undeliverable  
 Cancelled Administrative Action  
 Ballot Not Received  
 Voter Spoiled  
 Voter Request  
 Ballot Returned After Deadline  
 Voter Moved  
 Rejected at Polls/MBOC  
 Ineligible

**Rejected at Polls/MBOC**  
 Absentee ballot received after deadline  
 Absentee ballot received after deadline  
 Certificate envelope compromised or resealed  
 Certification insufficient  
 More than one of the same type of ballot enclosed  
 No POI enclosed and no certification from care facility representative  
 POR not received  
 Vote already recorded for this voter  
 Voter deceased  
 Voter not qualified  
 Election Official Error

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## Calendar Year Letter

A “calendar year” letter is being considered for those voters with calendar year applications who do not return an absentee ballot for any election within the effective year

Similar to the “indefinitely confined” letter

No 30 days to respond

Informs applicants that their absentee application has been deactivated due to not returning a ballot.

Informs those receiving the letter that they must reapply should they desire to continue to receive absentee ballots

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## Usability Testing

Usability testing will be a user-centered interaction with the WisVote absentee process to evaluate and gain feedback.

This can be seen as an irreplaceable usability practice, since it gives direct input on how real users use the system

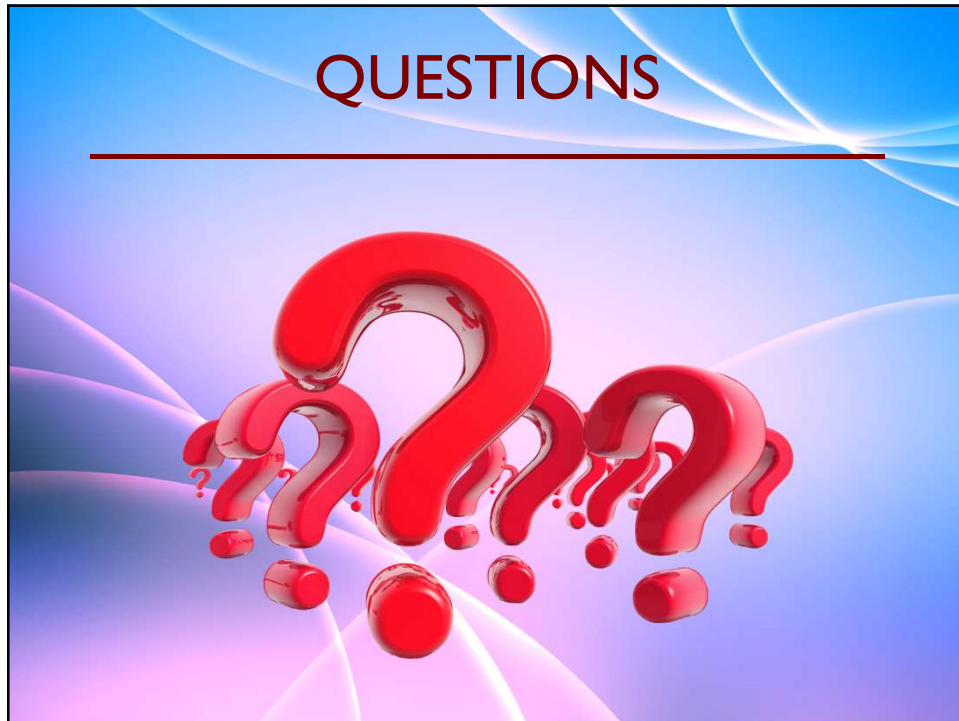
The Elections Commission recently conducted extensive usability testing on Election Reconciliation

Most likely August-October time frame

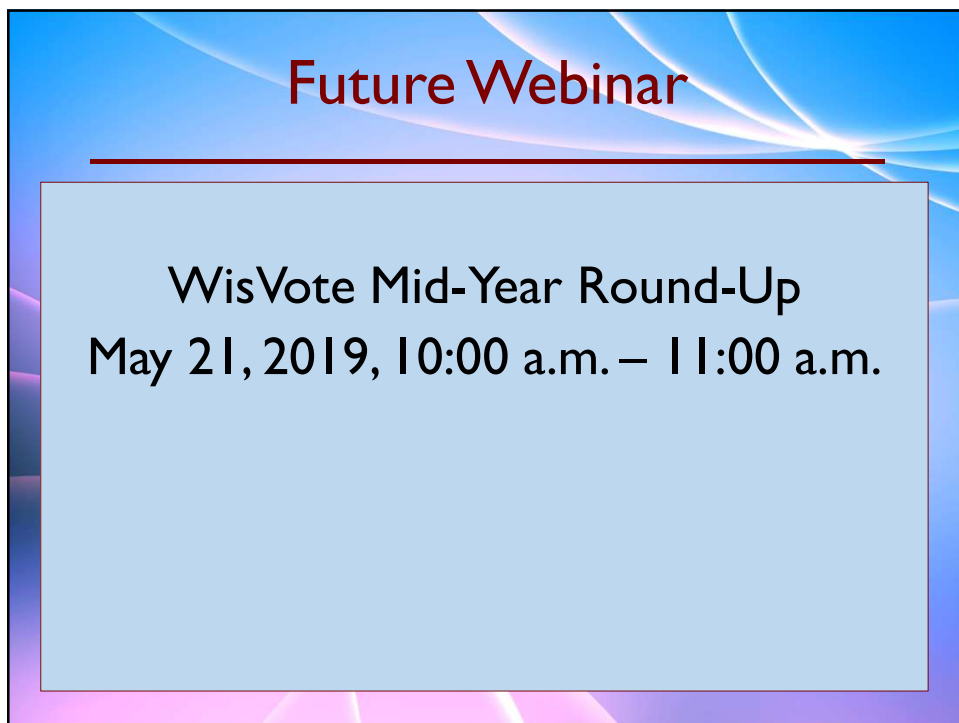
May be done remotely

Cross section of users/large municipalities/smaller municipalities/new and seasoned clerks/municipal and county clerks who provide absentee support for voters

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